



**Subject: JOINT FINANCIAL MANAGEMENT IMPROVEMENT PROGRAM**

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**1-60-00 Purpose**

This chapter sets forth the objectives of the Joint Financial Management Improvement Program (JFMIP). It provides the guidelines for HHS participation in the JFMIP and for reporting annually initiatives undertaken by the Office of the Secretary, Operating Divisions (OPDIVs), and Regions to improve financial management in the Department.

**1-60-10 OVERVIEW**

The JFMIP is a joint and cooperative undertaking of its sponsoring agencies consisting of the Office of Management and Budget, the General Accounting Office, the Department of the Treasury and the Office of Personnel Management. The program is administered by a Steering Committee, which is composed of representatives of the sponsoring agencies, the Executive Director of the JFMIP and a representative from a major Department. Under the guidance of the steering committee, the Executive Director and staff develop, direct and undertake programs and projects for JFMIP on a day-to-day basis. The overall objectives of the JFMIP are to:

- Encourage and promote the sharing and exchanging of information concerning good financial policies, practices and techniques throughout the Government.
- Improve financial management throughout the Government, and thereby contribute significantly to the effective and efficient planning and operation of Government programs.

**1-60-20      HHS SUPPORT OF JFMIP EFFORTS**

To achieve fully the necessary coordination and cooperation the Office of the Secretary, OPDIVs and Regions will identify financial management officials to serve as a point of contact on matters relating to the JFMIP. These officials are identified in the Federal Financial Management Directory. Their names are listed along with representatives of other Government Departments and Agencies. The JFMIP program is implemented in HHS in the following ways:

- Special projects undertaken to study significant problem areas and recommend solutions. HHS components benefit by cooperating with and participating in these studies when requested by the Deputy Assistant Secretary, Finance.
- An annual report on the progress within HHS on its own financial management improvements helps ensure continued management attention to and interest in improving financial management. The report describes financial management activities accomplished and in progress, and becomes part of the JFMIP Annual Report highlighting some of the major financial management improvements throughout the Federal Government.

**1-60-30      INFORMATION REQUIREMENTS**

A. As appropriate the Office of the Secretary, OPDIVs and Regions shall prepare an annual Status Report of Financial Management Improvements on major projects on a calendar year basis. The report shall describe the project, highlight potential or actual savings, and identify the responsible action official who may be contacted for further details. A "major" project for the JFMIP annual report is one of the following:

1. Eliminates weaknesses that could lead to fraud, waste, abuse, and mismanagement of Government resources.
2. Implements actions that are in response to the Congress.
3. Improves the accuracy, reliability, and timeliness of financial reports.

- B. The annual report(s) will be submitted in original and five copies to the Deputy Assistant Secretary, Finance within 15 days following the close of the calendar year. Distribution will be made as follows:
1. The original and two copies of status reports selected for inclusion in the HHS annual report will be submitted to the JFMIP.
  2. Copies three and four of the status reports will be provided to the OIG Office of Audit and to the Departmental Internal Control (IC) Officers. The purpose of this is to inform both OIG and the IC Officers of areas of review and to improve coordination with the JFMIP. It also allows them the opportunity to make available any additional information they might have with respect to the subject matter of the status reports.
  3. The last copy will be retained on file with the Office of the Deputy Assistant Secretary, Finance.
- C. Instructions for completing the annual Status Report of Financial Management Improvements are as follows:
1. The reporting format to be used is provided on Exhibit 1-60A. The annual report should consist of a series of narrative summaries prepared in this format (one page for each major financial improvement).
  2. For each item being reported, enter in the space provided one of the following report categories:
    - (a) Financial Management Systems (as defined in MB Circular A-127)
    - (b) Accounting Policies and Procedures.
    - (c) Financial Reporting
    - (d) Cash and Credit Management/Debt Collection (e.g. smart cards, third party drafts, EFT, etc.
    - (e) Automated Applications (e.g. enhanced input/output interface, the use of microcomputers, networking).
    - (f) Productivity.
    - (g) Budget Development and Execution.
    - (h) Cross-Servicing.
    - (i) Other initiatives (i.e., standardization of financial data).
    - (j) Auditing (for direct response by OIG).
  3. The status of each reported item should be checked either as "Accomplished." i.e., completed during the calendar year, or "In Process."

4. For each reported item, there should be included in narrative form in the summary section of the report:
    - (a) concise and succinct description of the improvement.
    - (b) The actual or estimated implementation/completion date.
    - (c) Any actual or anticipated cost savings.
    - (d) Other major benefits.
    - (e) The name and telephone number of an individual to whom requests for more specific information on the improvement can be directed.
  5. The narrative should be descriptive of the improvement, yet be concise enough that it can be reported with minimum or no modification in the Annual JFMIP Report. Acronyms or abbreviations are not to be used unless they are fully explained or identified. Examples of management improvement projects reported in the HHS 1988 JFMIP submissions are provided in Exhibit 1-60-B. The summary narrative on each reported item should be limited to the space provided on Exhibit 1-60-A. Refer to previous JFMIP annual reports for a guide concerning length and description of the summary report on each improvement. More detailed information is optional but, if prepared, it should be attached to the summary report.
- D. Instructions for updating the HHS portion of the JFMIP Federal Financial Managers Directory are as follows:
1. A current updated directory listing of the Office of the Secretary, OPDIV and Regional financial management officials shall be submitted with the annual report. The listing will include the title of the position, address and telephone number for each individual. The list of officials should cover, as a minimum, those functions identified in Section 1-60-30-C-2.
  2. To assist in updating the directory, refer to the Department of Health and Human Services Federal Financial Managers Directory in Exhibit 1-60-C. If changes needed are minor, submit a marked-up copy of Exhibit 1-60-C.

Status Report of Financial Management Improvements

Department or Agency:\_\_\_\_\_

Bureau or Subdivision:\_\_\_\_\_

Category:\_\_\_\_\_

Status:        [     ]        Accomplished        [     ]        In Process

Description of Improvement

SUMMARY

Contact Person \_\_\_\_\_Phone Number\_\_\_\_\_

Details: (Optional, attach is prepared)

Status Report of 1988 Financial Management Improvements.

Department or Agency: Department of Health and Human Services

Bureau or Subdivision: Office of the Secretary

Category: Financial Management Systems

Status:     [     ]           Accomplished           [ X ]           In Process

Description of 1988 Improvement

SUMMARY

During 1988 the Department of Health and Human Services finalized the Phoenix Project Plan, addressing the accounting systems requirements of the entire Department. The plan calls for each Departmental component to acquire a primary account system which may be customized to meet unique agency needs while at the same time meeting the overall Departmental requirements as prescribed in the Departmental Accounting Manual. The importance of this achievement is that the implementation of this software will standardize, for all components and operating division of HHS, its chart of accounts, transaction codes, object class codes, accounting tables, input record layouts and accounting classification code structure, thus creating a single integrated Financial Management System for the Department.

Contact Person William T. Topolewski Phone Number (202) 245-6497

DETAILS: (Optional, attach if prepared)

Status Report of 1988 Financial Management Improvements.

Department or Agency: Department of Health and Human Services

Bureau or Subdivision: Centers for Disease Control

Category: CDC Travel Management System

Status:        ☐            Accomplished                    ☒            In Process

Description of 1988 Improvement

SUMMARY

The Department of Health and Human Services, Centers for Disease Control, is phasing into production an interactive, on-line Travel Management System (TMS). The system incorporates the functional requirements as outlined in the Department's Phoenix Project. The system was developed using a modern data base management system and state-of-the art concepts. The various travel documents and other documents generated as a result of travel are prepared in an on-line, interactive environment and submitted to the appropriate officials for electronic approval. Once approved, the travel documents are then electronically prepared and printed at printers attached to the personal computers. The system is fully integrated with the accounting function. There is a Cashier Module that provides for on-line verification that a traveler is authorized to pick up an advance. The module also electronically prepares any travel related documents required by the cashier. There is an Airline Ticket Module which provides for on-line verification that a traveler is authorized to pick up an airline ticket and handles recording and paying of airline carrier bills. A computer-generated list of travel selected for random audit can be produced on an "as needed" basis. Most importantly, the system automatically records all financial transactions (i.e., obligations, advances and expenditures) in the accounting system. The system will be installed at the first site in early 1989 and will be fully implemented at all sites by the end of FY 1989.

Contact Person Claude F. Pickelsimer, Jr. Phone Number (404) 842-6600

DETAILS: (Optional, attach if prepared)

Status Report of 1988 Financial Management Improvements.

Department or Agency: Department of Health and Human Services

Bureau or Subdivision: Food and Drug Administration

Category: Automated Applications -- Accounts Payable

Status:     [ X ]           Accomplished                     [    ]           In Process

Description of 1988 Improvement

SUMMARY

In 1988 the Department of Health and Human Services's Food and Drug Administration (FDA) implemented an automated Accounts Payable System designed to facilitate compliance with the Prompt Pay Act and to issue payments under this Act. The system automatically determines the prompt pay date for each payment, as well as any discount or interest penalty. Standard transactions for the general ledger are also generated. Data files provide a base for the preparation of reports and the measurement of accounting technician performance. It is currently operational at FDA headquarters and is used by approximately 20 accounting technicians. This system is characterized by a stringent set of internal controls.

Contact Person Frank P. Claunts Phone Number (301) 443-3260  
DETAILS: (Optional, attach if prepared)



Status Report of 1988 Financial Management Improvements.

Department or Agency: Department of Health and Human Services

Bureau or Subdivision: Social Security Administration

Category: Financial Management Systems

Status:     [ X ]           Accomplished                     [    ]           In Process

Description of 1988 Improvement

SUMMARY

The Social Security Administration, Department of Health and Human Services, developed a budget tracking system that strengthened execution of its \$256 million information technology system budget by administratively controlling funds at the project level. Financial reports now track actual against planned spending by project. The status of funds data is available on-line or in hardcopy reports. The enhanced reporting permits the agency to track changes from the legislative to the operating budget, ensure that funds are used only for approved projects, and reprogram budgetary resources in the event they become available.

Contact Person Charles A. Lewis Phone Number (301) 965-0003

DETAILS: (Optional, attach if prepared)

DEPARTMENT OF HEALTH AND HUMAN SERVICES  
FEDERAL FINANCIAL MANAGERS DIRECTORY

OFFICE OF THE SECRETARY (OS) - (DEPARTMENTAL)  
MANAGEMENT BY FUNCTION

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MANAGEMENT AND BUDGET (ASMB)

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and Systems  
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(FTS) 245-6176

Cash/Credit/Debt Management  
David A. Quinn  
Director, Division of Financial  
Management Policy, OFP  
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Financial Reporting  
Frank W. Sullivan  
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and Fiscal Policy, QFP  
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HHS Exhibit 1-60-C  
Departmental Accounting Manual  
HHS Transmittal 89.6 (12/31/89)

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ADP Cost Reviews  
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Cost Allocation  
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Determination Management, OGCFM  
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Budgeting  
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Budgeting  
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OS/ASMB/MANAGEMENT AND ACQUISITION

Procurement Policy and Operations  
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Procurement Operations  
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